

## Succession Planning for Success

Below are the key ingredients for a full succession plan to help all organizations prepare for an eventual leadership transition. Improving your leadership capacity and operations will make future growth easier. These documents should be developed through a collaborative process involving the executive director and board members.

### Emergency Succession Policy

First, the adoption of a succession policy by the Board of Directors will authorize the organization to immediately enact a series of steps that will help to continue service to people and the community during short-term absences or following the departure of the Executive Director. The policy should cover appointments for an acting executive director, the board's responsibilities, and a hiring process. [A template is available here.](#)

### Organizational Inventory

This document will include the location of key agency information including bank account information, critical passwords, people to contact in an emergency, and a communication plan for an emergency.

All key employees should complete a list of their tasks and what they need to do them. This includes where to find files, who they need to contact, and how they do each task. Include a calendar for daily, weekly, monthly and annual tasks so nothing is forgotten. It does take time to put this together, but it will pay off tremendously for vacations, tracking rarely used data and eventual departures. The inventory process will also help you identify important tasks that others should be cross-trained on.

### Job Descriptions

Are your job descriptions current and accurate? Is everyone doing the tasks that make the most sense for their skills and abilities? What skills need to be developed among staff? This is great way to review job descriptions and update them.

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## Leadership Development

Who are the potential future leaders in your organization? Whether or not they are future candidates for the executive director, train them now to take on leadership roles, and they will be more engaged employees. In addition, develop a strong assessment process for all staff, including the executive director, so that everyone can develop their skills. [More tips and samples are here.](#)

## Departure Defined Succession Plan

If your executive director is preparing to leave in the next two to five years, the organization has an opportunity and impetus to prepare for a successful transition. What does your ideal transition plan look like? What needs to happen in the meantime? Often this involved shoring up the systems and finances of the organization. A template is in the [Federal Reserve's toolkit.](#)

## Update Annually

Finally, once you have developed these documents, remember to make updating them annually part of your board calendar.

## Additional Resources

There are two other documents that have a wealth of information on succession planning. [The Federal Reserve of Kansas City has a comprehensive toolkit](#) that includes case studies, what to do in various situations, and templates. In addition, [Building Leaderful Organizations](#) from the Annie E. Casey Foundation is well worth reading. It includes case studies, plans, and a self-assessment for EDs.

## Succession Planning Assistance

After experiencing my own transition leaving an organization that I led for 11 years, being part of multiple other transitions, and completing a wealth of trainings and readings on the subject, I can help you with your organization's succession planning process. Please reach out to me to schedule a complimentary hour succession plan review to talk through your next steps.

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